
Textiles, Apparel, and Footwear

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Change in 2004 from 2003¹

U.S. trade deficit: Increased \$6.2 billion (9 percent) to \$76.4 billion
U.S. exports: Increased \$0.6 billion (4 percent) to \$17.7 billion
U.S. imports: Increased \$6.8 billion (8 percent) to \$94.0 billion

The U.S. trade deficit in textiles and apparel widened as U.S. imports rose faster than U.S. exports (table TX-1). U.S. production of sector goods continued to decline in 2004, with output dropping 2 percent for textiles and 6 percent for apparel.² A large part of the increase in imports continued to occur in goods for which quotas were removed in 2002 (table TX-2).³ Apparel accounted for 77 percent of the sector imports in 2004.

The widening of the trade deficit in textiles and apparel in 2004 principally stemmed from the continued strong growth of imports from Asia, particularly China, Vietnam, Indonesia, and India. The trade deficit with Asia widened by \$5.2 billion (11 percent) to \$52.6 billion as the \$5.4 billion increase in U.S. imports from the region far exceeded the \$207 million gain in U.S. exports to the region. Imports from China rose \$3.5 billion (23 percent) in 2004 to \$18.9 billion, making China again the largest supplier by far, with 20 percent of sector imports, up from 18 percent in 2003. Much of the growth in China's shipments continued to be concentrated in goods for which China became eligible for quota elimination in 2002, namely, knit fabrics, brassieres, textile luggage, babies' apparel, and robes and dressing gowns. However, growth in imports of cotton and manmade-fiber knit fabrics, brassieres, and robes and dressing gowns was restricted in 2004 because the United States reinstated import quotas on products in these categories from China under the textile safeguard provision of China's WTO Accession Agreement in December 2003. These three safeguards remained in effect for the 12-month period ending December 23, 2004.⁴ The only other China textile safeguard action initiated by the Committee for the Implementation of Textile Agreements (CITA) as of April 1, 2005, occurred in October 2004, when it imposed safeguards and requested consultations with China on cotton, wool, and manmade-fiber socks.⁵ During October–December 2004, CITA also accepted for consideration 12 requests for textile safeguards

¹ Footwear is covered separately in this chapter.

² Board of Governors of the Federal Reserve System, Federal Reserve Statistical Release - G.17, Industrial Production and Capacity Utilization, "Rates of Change in Industrial Production, Market and Industry Group Summary: 2000-2004," found at <http://www.federalreserve.gov>, retrieved Mar. 4, 2005. The sector goods covered in this writeup are classified under the North American Industry Classification System (NAICS) numbers 313 (textile mills, i.e., firms that prepare and spin fiber, knit or weave fabric, and finish the textile), 314 (textile product mills, i.e., establishments that manufacture textile products, except apparel, from purchased fabric), and 315 (apparel manufacturing, i.e., establishments that cut and sew fabric to make garments or that knit and then cut and sew the fabric into a garment).

³ Imports will likely continue to grow following elimination of all remaining quotas on sector goods from WTO countries on Jan. 1, 2005, as required by the WTO Agreement on Textiles and Clothing.

⁴ CITA's notices on the safeguards appeared in the *Federal Register* of Dec. 29, 2003 (68 F.R. 74944–74949).

⁵ CITA's notice on the safeguards appeared in the *Federal Register* of Nov. 1, 2004 (69 F.R. 63371).

Table TX-1

Textiles and apparel: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2000–2004¹

Item	2000	2001	2002	2003	2004	Change, 2004 from 2003	
						Absolute	Percent
Million dollars							
U.S. exports of domestic merchandise:							
China	221	261	339	405	501	96	23.8
Mexico	6,155	5,232	4,939	4,696	4,730	33	0.7
Canada	3,646	3,344	3,193	3,121	3,275	154	4.9
Hong Kong	332	313	324	313	331	17	5.6
Honduras	1,475	1,409	1,523	1,522	1,547	26	1.7
India	46	39	44	54	68	13	25.0
Dominican Rep	1,395	1,290	1,293	1,263	1,267	4	0.3
Korea	202	170	184	207	208	1	0.7
Indonesia	49	45	55	59	77	18	30.1
Italy	145	128	120	120	129	9	7.7
All other	6,688	5,887	5,282	5,274	5,531	258	4.9
Total	20,353	18,118	17,298	17,033	17,663	630	3.7
EU-15	1,924	1,698	1,520	1,473	1,533	60	4.1
OPEC	261	269	222	202	267	64	31.8
Latin America	12,003	10,536	10,077	9,803	9,916	113	1.2
CBERA	5,125	4,783	4,761	4,688	4,680	-8	-0.2
Asia	2,030	1,819	1,883	1,963	2,171	207	10.6
Sub-Saharan Africa	136	131	124	131	139	8	6.4
Central and Eastern Europe	43	46	40	38	42	4	9.7
U.S. imports of merchandise for consumption:							
China	10,710	11,124	12,602	15,426	18,902	3,476	22.5
Mexico	10,580	9,941	9,649	9,015	8,826	-189	-2.1
Canada	3,945	3,791	3,859	3,788	3,834	47	1.2
Hong Kong	4,804	4,491	4,081	3,863	4,012	149	3.9
Honduras	2,423	2,443	2,509	2,578	2,754	177	6.9
India	3,161	3,038	3,382	3,668	4,106	438	11.9
Dominican Rep	2,478	2,337	2,242	2,210	2,143	-67	-3.0
Korea	3,479	3,316	3,287	2,986	3,030	44	1.5
Indonesia	2,446	2,580	2,405	2,462	2,714	252	10.2
Italy	2,484	2,420	2,380	2,526	2,627	101	4.0
All other	34,399	34,465	35,189	38,720	41,096	2,377	6.1
Total	80,909	79,946	81,585	87,241	94,045	6,804	7.8
EU-15	5,360	5,190	5,163	5,391	5,720	329	6.1
OPEC	3,153	3,251	2,981	3,016	3,217	201	6.7
Latin America	21,654	20,841	20,639	20,553	21,058	504	2.5
CBERA	9,817	9,728	9,711	9,865	10,213	348	3.5
Asia	43,544	43,218	44,666	49,371	54,783	5,412	11.0
Sub-Saharan Africa	789	998	1,136	1,552	1,802	250	16.1
Central and Eastern Europe	511	541	515	562	565	4	0.6

See footnote(s) at end of table.

Table TX-1—*Continued*Textiles and apparel: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2000–2004¹

						Change, 2004 from 2003	
Item	2000	2001	2002	2003	2004	Absolute	Percent
	Million dollars						
U.S. merchandise trade balance:							
China	-10,489	-10,863	-12,263	-15,021	-18,401	-3,380	-22.5
Mexico	-4,426	-4,709	-4,710	-4,319	-4,097	222	5.1
Canada	-299	-446	-666	-666	-559	107	16.1
Hong Kong	-4,472	-4,178	-3,757	-3,549	-3,681	-131	-3.7
Honduras	-948	-1,034	-986	-1,056	-1,207	-151	-14.3
India	-3,115	-3,000	-3,337	-3,614	-4,039	-425	-11.8
Dominican Rep	-1,082	-1,047	-950	-948	-876	71	7.5
Korea	-3,276	-3,146	-3,103	-2,780	-2,822	-42	-1.5
Indonesia	-2,397	-2,536	-2,350	-2,402	-2,636	-234	-9.7
Italy	-2,339	-2,292	-2,259	-2,407	-2,498	-92	-3.8
All other	-27,711	-28,578	-29,906	-33,446	-35,565	-2,119	-6.3
Total	-60,555	-61,828	-64,288	-70,208	-76,382	-6,174	-8.8
EU-15	-3,436	-3,491	-3,644	-3,918	-4,187	-269	-6.9
OPEC	-2,892	-2,982	-2,759	-2,814	-2,951	-137	-4.9
Latin America	-9,651	-10,305	-10,563	-10,750	-11,141	-391	-3.6
CBERA	-4,692	-4,946	-4,950	-5,176	-5,532	-356	-6.9
Asia	-41,515	-41,399	-42,783	-47,408	-52,612	-5,204	-11.0
Sub-Saharan Africa	-653	-867	-1,012	-1,421	-1,663	-241	-17.0
Central and Eastern Europe	-468	-495	-474	-523	-523	(²)	(³)

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.²Less than \$500,000.³Less than 0.05 percent.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2004.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table TX-2
Leading changes in U.S. exports and imports of textiles and apparel, 2000–2004¹

Industry/commodity group	2000	2001	2002	2003	2004	Change, 2004 from 2003	
						Absolute	Percent
	Million dollars						
U.S. EXPORTS:							
Increases:							
Fabrics (CH046)	6,067	6,162	6,485	6,641	7,228	587	8.8
Fibers and yarns, except raw cotton and raw wool (CH045)	3,126	2,640	2,656	2,872	3,192	319	11.1
Miscellaneous textile products (CH050)	1,774	1,666	1,619	1,534	1,701	167	10.9
Carpets and rugs (CH047)	791	711	684	681	763	82	12.0
Decreases:							
Apparel (CH049)	8,177	6,537	5,491	4,965	4,414	-551	-11.1
Table/kitchen linens and towels (CH048C)	113	109	93	85	71	-13	-15.6
All other	305	294	270	254	294	39	15.5
TOTAL	20,353	18,118	17,298	17,033	17,663	630	3.7
U.S. IMPORTS:							
Increases:							
Apparel (CH049)	64,402	63,995	63,927	68,274	72,404	4,130	6.0
Home furnishings (CH048)	3,215	3,332	4,226	5,021	6,107	1,087	21.6
Miscellaneous textile products (CH050)	3,005	3,198	3,340	3,754	4,319	565	15.1
Fibers and yarns, except raw cotton and raw wool (CH045)	2,771	2,545	2,641	2,676	3,160	484	18.1
Decreases:							
Knit fabrics (CH046B)	1,004	1,014	1,080	1,026	979	-47	-4.6
All other	6,512	5,862	6,373	6,490	7,077	586	9.0
TOTAL	80,909	79,946	81,585	87,241	94,045	6,804	7.8

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

Note.—Calculations based on unrounded data.

Source: Compiled from official statistics of the U.S. Department of Commerce.

that allege a threat of market disruption, rather than actual market disruption, by Chinese textile imports.⁶ U.S. retailers and apparel companies continue to source a substantial portion of sector goods from China because of the country's low production costs, its ability to make almost any type of textile product or garment at any quality level, and its abundant labor force.⁷

Vietnam continued to grow as a leading supplier of apparel after the United States granted it normal trade relations (NTR) status in December 2001.⁸ Apparel imports from Vietnam totaled \$2.6 billion, up from \$2.4 billion in 2003 and from less than \$50 million in 2000. The growth in Vietnam's apparel shipments slowed considerably in 2004, after the United States established quotas on Vietnamese textiles and apparel for the first time in May 2003. U.S. apparel imports from Indonesia also rose in 2004 to \$2.5 billion, up 10 percent from \$2.3 billion in 2003. Apparel imports from India totaled \$2.4 billion in 2004, up 9 percent from \$2.2 billion in 2003.

U.S. exports of textiles and apparel rose for the first time in 3 years, by \$630 million (4 percent) to \$17.7 billion. The increase in 2004 partly reflected slightly larger shipments to the major foreign markets for the U.S. textile and apparel sector (NAFTA signatories Canada and Mexico). These markets, together with the beneficiary countries under the Caribbean Basin Economic Recovery Act (CBERA), accounted for \$12.7 billion (72 percent) of U.S. sector goods exports by value in 2004. U.S. sector exports to the CBERA countries, which are estimated to consist almost entirely of cut parts and fabrics and yarns for the production of apparel for export to the United States, continued to decline, falling \$8 million to \$4.7 billion. U.S. exports to Asian markets, including China, also rose in 2004; principal exports included cotton, artificial filament tow, and nonwovens.

The U.S. trade deficit with Canada and Mexico narrowed to \$4.7 billion in 2004 from \$5.0 billion in 2003. U.S. sector imports from Mexico have been declining since 2000, reflecting increased competition from the CBERA countries benefiting from new U.S. trade preferences for the region (see below) and from lower-cost countries in Asia, particularly China, following quota elimination for certain sector goods in 2002. In addition, Mexico's rising labor and energy costs and the lack of financing needed to upgrade technology and to expand the number of full-package programs⁹ have hampered the growth of Mexico's exports to the United States.¹⁰

⁶ Three of the 12 threat-based requests involved reapplication of safeguards on knit fabrics, brassieres, and robes and dressing gowns that expired on Dec. 23, 2004. The other nine requests involved articles from China that were still under quota in 2004. On Apr. 27, 2005, the Court of Appeals for the Federal Circuit (CAFC) granted the U.S. Government's motion for a stay, pending appeal, of the temporary injunction issued by the Court of International Trade (CIT) on December 30, 2004, that barred CITA from proceeding on the 12 petitions based on a threat basis of market disruption. On June 29, 2005, the CAFC reversed the CIT's injunction barring CITA from proceeding on threat-based textile safeguard petitions on Chinese textiles and apparel.

⁷ For additional information on China's textile and apparel industry, see U.S. International Trade Commission, *Textiles and Apparel: Assessment of the Competitiveness of Certain Foreign Suppliers to the U.S. Market*, Investigation No. 332-448, USITC publication 3671, Jan. 2004, found at <http://hotdocs.usitc.gov/docs/pubs/332/pub3671/main.html>, retrieved May 27, 2005.

⁸ NTR status means that imports of goods from Vietnam are subject to much lower rates of duty than they had been previously.

⁹ Full-package programs refer to arrangements in which a supplier agrees to provide a range of services, such as apparel design, fabric procurement, and apparel assembly, packaging, and distribution, or any combination of these services.

¹⁰ Apparel, "Mexico's Race Against Time," May 1, 2004, found at <http://www.bobbin.com/bobbin/magazine/article>, retrieved Mar. 18, 2005; Emerging Textiles, "While Niche Markets Could Offer Opportunities, Mexico's Decline Could Be Accelerated by CAFTA and Quota Phasing-Out," found at http://swatch.igc.org/global/articles/mexicoet_jul04.html; and International Market Insight, "Seller Beware: The Textile Apparel Industry in Mexico," 2004, found at <http://stategis.gc.ca>, retrieved Mar. 18, 2005.

The textile and apparel trade deficit with CBERA countries widened by \$356 million (7 percent) as imports from the region rose \$348 million (4 percent) to \$10.2 billion in 2004 and exports to the region fell \$8 million (0.2 percent) to \$4.7 billion. Since the implementation of the United States–Caribbean Basin Trade Partnership Act in 2000,¹¹ U.S. yarns and uncut fabrics have replaced higher value-added garment parts in trade with CBERA countries. During 2000–2004, U.S. exports of certain cotton yarns and cotton fabrics to the CBERA countries increased more than sevenfold, from \$84 million to \$691 million.¹² In 2004, U.S. exports of broadwoven fabrics grew by \$179 million to \$2.8 billion, and U.S. exports of knit fabrics rose \$232 million to \$1.6 billion. In contrast, exports of cut apparel pieces fell \$551 million (11 percent) to \$4.4 billion in 2004. Honduras and El Salvador are leading CBERA markets for U.S. textile and apparel exports, accounting for 60 percent of U.S. sector exports to the region in 2004.

The textile and apparel trade deficit with sub-Saharan African (SSA) countries rose \$241 million (17 percent) to \$1.7 billion in 2004, reflecting continued growth in apparel imports fueled by the African Growth and Opportunity Act (AGOA), which grants duty-free and quota-free treatment to imports of qualifying textile and apparel articles from SSA countries. AGOA permits lesser-developed SSA countries (all eligible SSA countries except South Africa, and until recently, Mauritius) with apparel visas¹³ to use third-country (e.g., Asian) fabrics in their production of apparel for export to the United States and still qualify for AGOA preferences.¹⁴

In terms of industry/commodity groups, most of the growth in U.S. imports of sector goods occurred in apparel and home furnishings. U.S. imports of apparel increased \$4.1 billion (6 percent) to \$72.4 billion, reflecting a continued trend by retailers and apparel companies increasingly to source from lower-cost offshore providers. An increase in consumer spending on apparel of 6 percent also boosted demand for imports in 2004.¹⁵ U.S. apparel retail sales were up in 2004 after 3 years of decline; men's tailored clothing was the top-selling apparel category.¹⁶ U.S. retail dollars spent on men's suits, suit separates, sport coats, and blazers rose approximately \$775 million (24 percent) to \$4.0 billion in 2004.¹⁷

¹¹ The CBTPA granted duty-free and quota-free entry to qualifying apparel assembled from fabrics made in the United States of U.S.-made yarns and allowed uncut fabrics to be shipped to CBERA countries for both cutting and assembly into qualifying apparel.

¹² Based on U.S. Department of Commerce trade statistics for cotton yarn (HTS heading 5205) and cotton fabrics (HTS headings 5209 and 5212). Cotton apparel is a leading U.S. import from the CBERA countries.

¹³ Textile and apparel benefits provided by the AGOA are available only to beneficiary SSA countries that (1) have adopted an effective visa system and related procedures to prevent unlawful transshipment and the use of counterfeit documents, and (2) have implemented and follow, or are making substantial progress toward implementing and following, certain customs procedures that assist the Customs Service in verifying the origin of the products.

¹⁴ This provision was extended from September 2004 until 2007 as part of the AGOA Acceleration Act of 2004 (AGOA III) signed by President George W. Bush on July 13, 2004. In addition, on Dec. 3, 2004, President Bush signed into law the Miscellaneous Trade and Technical Corrections Act of 2004 (Public Law 108-429). Section 2004(k) of the act designated Mauritius as a lesser-developed beneficiary country (LDBC) under AGOA for one year, from Oct. 1, 2004, through Sept. 30, 2005. Accordingly, imports of apparel made in Mauritius from third-country fabrics can enter free of duty during the specified 1-year period, not to exceed 5 percent of the sub-cap available for apparel imported under the special rule for the LDBCs (or about 26.8 million square meter equivalents). See Office of the United States Trade Representative, "Notice of Change to...Chapter 98 of the Harmonized Tariff Schedule of the United States," and CITA, "Limitations of Duty and Quota-Free Imports of Apparel Articles Assembled in Mauritius from Third-Country Fabric," *Federal Register*, Feb. 24, 2005 (70 F.R. 9125) and Mar. 1, 2005 (70 F.R. 9929), respectively.

¹⁵ Data on consumer spending are from the Bureau of Economic Analysis (BEA), U.S. Department of Commerce (Commerce), "Table 2.4.5U - Personal Consumption Expenditures by Type of Product," Feb. 28, 2005, available at <http://www.bea.gov>.

¹⁶ The NPD Group, Inc., "The NPD Group Reports U.S. Retail Apparel Sales Up After Three Years of Decline," Feb. 23, 2005 (news release).

¹⁷ Stan Gellers, "Look Who's Making Suits Now!" *DNR*, Mar. 7, 2005, p. 29.

Trade sources report that various factors, including the growth in the U.S. economy, which boosted consumer confidence and disposable income, as well as new fashions, encouraged consumer spending on apparel.¹⁸ U.S. imports of home furnishings grew by \$1.1 billion (22 percent) to \$6.1 billion in 2004. The largest growth in imports of these products occurred in pillowcases and sheets, table/kitchen linens and towels, pillows, cushions and sleeping bags, and bedspreads.

The U.S. trade deficit in footwear continued to widen in 2004 as economic growth and a rise in consumer confidence prompted U.S. consumers to replenish their footwear collections, which are dominated by imports. China remained by far the leading supplier of footwear to the U.S. market, although imports from Vietnam have been rising as some U.S. importers seek to diversify their sources of supply.

¹⁸ Standard & Poor's, *Industry Surveys: Apparel and Footwear*, Sept. 16, 2004, found at <http://www.netadvantage.standardandpoors.com>, retrieved Mar. 7, 2005; and NPD Group, "The NPD Group Reports U.S. Retail Apparel Sales Up After Three Years of Decline."

Footwear

Change in 2004 from 2003:

U.S. trade deficit: Increased \$1.0 billion (7 percent) to \$16.0 billion

U.S. exports: Decreased \$0.05 billion (9 percent) to \$0.5 billion

U.S. imports: Increased \$0.9 billion (6 percent) to \$16.5 billion

The U.S. trade deficit in footwear¹⁹ widened in 2004, primarily because of a continued increase in imports (table TX-3), which accounted for more than 90 percent of the U.S. footwear market. The remainder of the U.S. footwear market was supplied by the domestic footwear industry, which comprises primarily niche manufacturers that compete on the basis of nonprice factors such as specialized types of footwear (e.g., sizes/widths and hand-sewn items), quality, exclusive channels of distribution, new product introductions, and brand differentiation.²⁰ Consumer spending on footwear rose 7 percent in 2004 to \$54.2 billion.²¹ Economic growth and a subsequent rise in consumer confidence likely contributed to the boost in consumer spending. Industry sources state that U.S. consumers have also shifted their focus from home-centered spending to replenishing their apparel and footwear collections.²² The average price of footwear continued to fall as lower-priced casual shoes accounted for an increasingly larger share of sales. Trade sources report that U.S. producers' footwear shipments continued to fall from the 2003 level of \$2.7 billion.²³

U.S. exports

The value of U.S. exports of footwear fell \$45 million (9 percent) to \$450 million in 2004. The decrease in U.S. exports of footwear in 2004 reflected reduced shipments to almost all export markets possibly as a result of continued worldwide competition from China (see below).

U.S. imports

China is the largest source of U.S. footwear imports, accounting for 69 percent of the imports by value in 2004. Italy and Brazil are the second- and third-leading suppliers of footwear to the United States, with respective shares of 8 percent and 7 percent. China's continued dominance in the U.S. market can likely be attributed to its price competitiveness because of low wages and an established and efficient production infrastructure. U.S. imports of footwear from China rose \$801 million (8 percent) to \$11.3 billion in 2004. Imports of footwear from Vietnam continued their steady increase since the United States granted the country NTR status in December 2001, rising \$149 million (46 percent) to \$473 million in 2004. A trade source noted that some U.S. importers have shifted part of their footwear sourcing from

¹⁹ The sector goods in this section are classified under NAICS number 3162 (Footwear Manufacturing, i.e., establishments primarily engaged in manufacturing footwear [except orthopedic extension footwear]).

²⁰ Casual shoes are expected to continue to gain market share at the expense of formal footwear. A new category called hybrid shoes, which includes casual shoes that incorporate sports technology, are expected to gain additional customer acceptance. Standard & Poor's, *Industry Surveys: Apparel and Footwear*; and Peter T. Mangione, President, Footwear Distributors and Retailers of America, written submission to the Commission, Investigation No. TA-2104-3, *U.S.-Central America-Dominican Republic Free Trade Agreement: Potential Economywide and Selected Sectoral Effects*, Aug. 2004.

²¹ BEA data, found at <http://www.bea.gov>.

²² Standard & Poor's, *Industry Surveys: Apparel and Footwear*.

²³ In 2004 the U.S. Census Bureau announced that it was no longer going to publish *Current Industrial Reports: Footwear Production*. Consequently, no shipments data are available for 2004. Officials of the American Apparel and Footwear Association (AAFA) stated that in 2004 U.S. footwear production continued to decline and that two Wisconsin footwear plants, LaCrosse in LaCrosse and Weyco in Beaver Dam, closed. Fawn Evenson, Vice President, Global Business and Services, AAFA, email to Commission staff, Mar. 14, 2005; and Nate Hermann, International Trade Advisor, AAFA, e-mail to Commission staff, Mar. 11, 2005.

Table TX-3

Footwear: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2000–2004¹

Item	2000	2001	2002	2003	2004	Change, 2004 from 2003	
						Absolute	Percent
Million dollars							
U.S. exports of domestic merchandise:							
China	43	46	35	36	31	-5	-14.9
Italy	4	5	5	6	6	(²)	-1.6
Brazil	1	1	1	2	3	1	46.1
Indonesia	14	13	15	12	9	-3	-22.8
Vietnam	27	19	18	23	24	2	7.4
Mexico	114	123	95	90	60	-30	-33.5
Thailand	7	5	4	5	4	-1	-13.8
Spain	3	5	6	6	2	-4	-66.8
Dominican Rep	54	51	30	27	23	-5	-17.0
Canada	72	70	65	57	59	3	4.7
All other	324	300	246	231	228	-3	-1.1
Total	664	638	520	495	450	-45	-9.1
EU-15	65	67	57	59	62	3	4.5
OPEC	34	37	35	26	23	-4	-13.5
Latin America	234	246	196	177	127	-50	-28.2
CBERA	94	97	75	67	53	-15	-21.6
Asia	253	218	164	158	157	-1	-0.5
Sub-Saharan Africa	14	10	13	15	13	-2	-13.9
Central and Eastern Europe	1	3	2	4	4	(²)	12.1
U.S. imports of merchandise for consumption:							
China	9,206	9,767	10,242	10,546	11,348	801	7.6
Italy	1,259	1,261	1,182	1,241	1,250	9	0.7
Brazil	1,149	1,162	1,080	1,040	1,081	41	3.9
Indonesia	731	725	731	570	493	-77	-13.5
Vietnam	125	132	224	325	473	149	45.7
Mexico	351	312	279	275	242	-33	-12.0
Thailand	329	315	278	285	287	3	0.9
Spain	325	273	269	235	225	-10	-4.4
Dominican Rep	181	193	140	138	137	-1	-0.9
Canada	76	79	68	64	77	12	19.2
All other	1,123	1,031	887	840	885	45	5.3
Total	14,856	15,249	15,379	15,560	16,498	938	6.0
EU-15	2,044	1,951	1,826	1,764	1,723	-41	-2.3
OPEC	732	725	731	570	494	-76	-13.4
Latin America	1,709	1,693	1,516	1,475	1,484	9	0.6
CBERA	196	206	148	149	149	1	0.4
Asia	10,841	11,330	11,797	12,046	12,963	918	7.6
Sub-Saharan Africa	1	1	1	1	2	1	40.2
Central and Eastern Europe	135	145	126	159	192	33	20.7

See footnote(s) at end of table.

Table TX-3—*Continued*

Footwear: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2000–2004¹

						Change, 2004 from 2003	
Item	2000	2001	2002	2003	2004	Absolute	Percent
	Million dollars						
U.S. merchandise trade balance:							
China	-9,163	-9,721	-10,207	-10,510	-11,317	-807	-7.7
Italy	-1,255	-1,256	-1,178	-1,235	-1,244	-9	-0.7
Brazil	-1,148	-1,160	-1,078	-1,038	-1,078	-40	-3.8
Indonesia	-717	-712	-716	-558	-484	74	13.3
Vietnam	-97	-113	-206	-302	-449	-147	-48.6
Mexico	-237	-189	-183	-185	-183	3	1.6
Thailand	-322	-311	-274	-280	-283	-3	-1.2
Spain	-322	-268	-263	-229	-223	6	2.7
Dominican Rep	-127	-142	-110	-111	-114	-3	-3.1
Canada	-4	-9	-3	-8	-18	-10	-123.0
All other	-799	-731	-641	-609	-656	-48	-7.8
Total	-14,192	-14,611	-14,860	-15,065	-16,048	-983	-6.5
EU-15	-1,978	-1,883	-1,769	-1,705	-1,661	44	2.6
OPEC	-698	-688	-696	-544	-471	73	13.4
Latin America	-1,474	-1,447	-1,320	-1,298	-1,357	-59	-4.5
CBERA	-102	-109	-73	-81	-97	-15	-18.7
Asia	-10,588	-11,113	-11,632	-11,888	-12,806	-919	-7.7
Sub-Saharan Africa	13	9	11	14	11	-3	-19.7
Central and Eastern Europe	-134	-142	-124	-155	-187	-32	-20.9

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

²Less than \$500,000.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2004.

Source: Compiled from official statistics of the U.S. Department of Commerce.

China to Vietnam as part of their efforts to diversify their sources of supply and in response to rising prices of Chinese footwear.²⁴

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²⁴ Vietnam Style, “Business/Import-Export - Opportunities for VN’s Footwear & Wooden Furniture in U.S.,” Feb. 24, 2005, found at <http://vn-style.com>, retrieved Mar. 8, 2005.

Table TX-4

Textiles, apparel, and footwear: U.S. trade for industry/commodity groups and subgroups, 2000–2004¹

USITC code ²	Industry/commodity group	2000	2001	2002	2003	2004	Change, 2004 from 2003	
							Absolute	Percent
Million dollars								
CH045	Fibers and yarns, except raw cotton and raw wool:							
	Exports	3,126	2,640	2,656	2,872	3,192	319	11.1
	Imports	2,771	2,545	2,641	2,676	3,160	484	18.1
	Trade balance	355	95	16	196	32	-164	-83.7
CH046	Fabrics:							
	Exports	6,067	6,162	6,485	6,641	7,228	587	8.8
	Imports	6,052	5,466	5,922	5,854	6,227	372	6.4
	Trade balance	15	696	563	786	1,001	215	27.4
CH046A	Broadwoven fabrics:							
	Exports	3,100	2,997	3,003	2,575	2,754	179	7.0
	Imports	3,622	3,058	3,243	3,036	3,154	117	3.9
	Trade balance	-521	-61	-240	-462	-400	62	13.4
CH046B	Knit fabrics:							
	Exports	787	918	1,082	1,392	1,624	232	16.7
	Imports	1,004	1,014	1,080	1,026	979	-47	-4.6
	Trade balance	-217	-96	3	365	645	279	76.4
CH046C	Specialty fabrics:							
	Exports	481	465	572	489	579	90	18.4
	Imports	374	346	383	410	465	55	13.5
	Trade balance	107	119	190	79	114	35	44.0
CH046D	Coated and other fabrics:							
	Exports	912	1,003	995	1,154	1,098	-56	-4.8
	Imports	591	570	679	743	891	148	19.9
	Trade balance	322	433	316	411	207	-204	-49.5
CH046E	Glass fiber fabrics:							
	Exports	99	84	87	118	146	28	24.1
	Imports	100	104	105	96	108	12	12.2
	Trade balance	-1	-20	-18	21	38	17	77.5
CH046F	Other fabrics:							
	Exports	688	696	744	914	1,027	113	12.4
	Imports	362	374	432	543	630	87	16.0
	Trade balance	326	322	312	371	397	26	7.1

See footnote(s) at end of table.

Table TX-4—Continued

Textiles, apparel, and footwear: U.S. trade for industry/commodity groups and subgroups, 2000–2004¹

							Change, 2004 from 2003	
USITC code ²	Industry/commodity group	2000	2001	2002	2003	2004	Absolute	Percent
Million dollars								
CH047	Carpets and rugs:							
	Exports	791	711	684	681	763	82	12.0
	Imports	1,464	1,410	1,531	1,662	1,829	167	10.1
	Trade balance	-674	-699	-846	-981	-1,066	-85	-8.7
CH048	Home furnishings:							
	Exports	418	403	363	339	365	26	7.7
	Imports	3,215	3,332	4,226	5,021	6,107	1,087	21.6
	Trade balance	-2,797	-2,929	-3,863	-4,682	-5,742	-1,060	-22.7
CH048A	Blankets:							
	Exports	36	34	32	29	31	2	8.3
	Imports	214	230	353	391	459	68	17.3
	Trade balance	-178	-196	-321	-362	-428	-65	-18.0
CH048B	Pillowcases and sheets:							
	Exports	94	90	76	78	81	3	4.3
	Imports	723	765	903	1,046	1,353	306	29.3
	Trade balance	-629	-675	-826	-968	-1,271	-303	-31.3
CH048C	Table/kitchen linens and towels:							
	Exports	113	109	93	85	71	-13	-15.6
	Imports	1,039	1,080	1,236	1,418	1,646	228	16.1
	Trade balance	-926	-970	-1,143	-1,333	-1,574	-241	-18.1
CH048D	Curtains:							
	Exports	40	35	39	30	39	9	30.0
	Imports	361	397	576	725	858	133	18.4
	Trade balance	-321	-362	-537	-695	-819	-124	-17.9
CH048E	Bedspreads and other furnishing articles:							
	Exports	45	43	41	43	49	6	13.3
	Imports	547	515	735	1,001	1,144	143	14.3
	Trade balance	-502	-472	-694	-958	-1,096	-138	-14.4
CH048F	Pillows, cushions, and sleeping bags:							
	Exports	90	91	81	74	93	19	26.1
	Imports	326	340	417	437	645	209	47.7
	Trade balance	-237	-250	-336	-363	-552	-189	-52.1
CH048G	Tapestries and other wall hangings:							
	Exports	1	1	1	1	1	(³)	-31.0
	Imports	5	5	6	4	3	-1	-22.4
	Trade balance	-4	-4	-5	-2	-2	(³)	18.6

See footnote(s) at end of table.

Table TX-4—Continued

Textiles, apparel, and footwear: U.S. trade for industry/commodity groups and subgroups, 2000–2004¹

							Change, 2004 from 2003	
USITC code ²	Industry/commodity group	2000	2001	2002	2003	2004	Absolute	Percent
Million dollars								
CH049	Apparel:							
	Exports	8,177	6,537	5,491	4,965	4,414	-551	-11.1
	Imports	64,402	63,995	63,927	68,274	72,404	4,130	6.0
	Trade balance	-56,225	-57,458	-58,436	-63,308	-67,989	-4,681	-7.4
CH049A	Men's and boys' suits and sports coats:							
	Exports	82	66	46	39	28	-11	-26.9
	Imports	1,196	1,026	974	1,143	1,139	-4	-0.3
	Trade balance	-1,114	-960	-928	-1,104	-1,111	-7	-0.6
CH049B	Men's and boys' coats and jackets:							
	Exports	114	99	92	91	89	-2	-1.8
	Imports	1,976	1,992	1,876	2,001	2,134	133	6.7
	Trade balance	-1,862	-1,893	-1,784	-1,910	-2,045	-135	-7.1
CH049C	Men's and boys' trousers:							
	Exports	997	728	625	573	437	-136	-23.7
	Imports	7,321	6,980	6,973	7,459	7,568	108	1.5
	Trade balance	-6,324	-6,252	-6,348	-6,887	-7,131	-244	-3.5
CH049D	Women's and girls' trousers:							
	Exports	587	454	357	287	267	-20	-7.0
	Imports	7,419	7,668	7,996	8,923	9,325	402	4.5
	Trade balance	-6,832	-7,214	-7,639	-8,636	-9,057	-422	-4.9
CH049E	Shirts and blouses:							
	Exports	2,052	1,533	1,219	1,097	800	-297	-27.1
	Imports	20,159	19,676	19,765	21,285	22,474	1,189	5.6
	Trade balance	-18,107	-18,143	-18,546	-20,188	-21,674	-1,486	-7.4
CH049F	Sweaters:							
	Exports	37	36	38	32	33	1	3.2
	Imports	2,506	2,933	2,959	2,729	2,632	-97	-3.6
	Trade balance	-2,469	-2,897	-2,921	-2,697	-2,599	98	3.6
CH049G	Women's and girls' suits, skirts, and coats:							
	Exports	249	211	154	136	146	10	7.2
	Imports	4,304	4,417	4,235	4,803	5,866	1,062	22.1
	Trade balance	-4,055	-4,206	-4,081	-4,667	-5,720	-1,052	-22.5
CH049H	Women's and girls' dresses:							
	Exports	106	81	62	59	61	2	3.0
	Imports	1,889	1,675	1,470	1,550	1,524	-26	-1.7
	Trade balance	-1,783	-1,594	-1,409	-1,491	-1,463	28	1.9

See footnote(s) at end of table.

Table TX-4—Continued

Textiles, apparel, and footwear: U.S. trade for industry/commodity groups and subgroups, 2000–2004¹

							Change, 2004 from 2003	
USITC code ²	Industry/commodity group	2000	2001	2002	2003	2004	Absolute	Percent
Million dollars								
CH049I	Robes, nightwear, and underwear:							
	Exports	1,028	906	744	715	700	-15	-2.1
	Imports	4,842	4,796	4,961	5,044	5,246	202	4.0
	Trade balance	-3,814	-3,889	-4,218	-4,329	-4,546	-217	-5.0
CH049J	Hosiery:							
	Exports	423	362	344	339	356	17	5.1
	Imports	950	923	1,031	1,091	1,316	225	20.6
	Trade balance	-527	-560	-687	-751	-959	-208	-27.7
CH049K	Body-supporting garments:							
	Exports	445	330	385	289	310	21	7.4
	Imports	1,439	1,434	1,648	1,579	1,800	221	14.0
	Trade balance	-993	-1,104	-1,263	-1,290	-1,490	-200	-15.5
CH049L	Neckwear, handkerchiefs, and scarves:							
	Exports	40	28	24	23	24	2	7.4
	Imports	510	457	432	494	698	204	41.4
	Trade balance	-470	-429	-408	-471	-674	-203	-43.1
CH049M	Gloves, including gloves for sports:							
	Exports	185	181	122	109	104	-5	-5.0
	Imports	2,076	2,119	2,176	2,386	2,533	147	6.2
	Trade balance	-1,891	-1,938	-2,054	-2,277	-2,430	-153	-6.7
CH049N	Headwear:							
	Exports	107	116	91	89	102	13	14.1
	Imports	1,245	1,288	1,279	1,358	1,526	168	12.4
	Trade balance	-1,138	-1,172	-1,188	-1,269	-1,424	-155	-12.2
CH049O	Leather apparel and accessories:							
	Exports	94	100	95	92	108	16	17.8
	Imports	2,028	2,121	1,869	1,743	1,605	-138	-7.9
	Trade balance	-1,934	-2,021	-1,775	-1,651	-1,497	154	9.3
CH049P	Fur apparel and other fur articles:							
	Exports	48	34	25	19	18	-2	-8.5
	Imports	241	264	245	285	334	49	17.2
	Trade balance	-193	-230	-220	-265	-316	-51	-19.1
CH049Q	Rubber, plastic, and coated-fabric apparel:							
	Exports	102	123	99	95	129	34	36.2
	Imports	390	381	349	371	462	91	24.6
	Trade balance	-288	-258	-250	-276	-334	-57	-20.7

See footnote(s) at end of table.

Table TX-4—*Continued*Textiles, apparel, and footwear: U.S. trade for industry/commodity groups and subgroups, 2000–2004¹

							Change, 2004 from 2003	
USITC code ²	Industry/commodity group	2000	2001	2002	2003	2004	Absolute	Percent
<i>Million dollars</i>								
CH049R	Nonwoven apparel:							
	Exports	42	52	47	37	34	-3	-9.1
	Imports	373	411	401	401	395	-6	-1.5
	Trade balance	-330	-360	-353	-364	-361	3	0.8
CH049S	Other wearing apparel:							
	Exports	1,437	1,095	922	845	668	-176	-20.9
	Imports	3,539	3,433	3,287	3,630	3,828	198	5.4
	Trade balance	-2,102	-2,338	-2,366	-2,785	-3,159	-374	-13.4
CH050	Miscellaneous textile products:							
	Exports	1,774	1,666	1,619	1,534	1,701	167	10.9
	Imports	3,005	3,198	3,340	3,754	4,319	565	15.1
	Trade balance	-1,231	-1,532	-1,721	-2,220	-2,618	-398	-17.9
CH051	Footwear:							
	Exports	664	638	520	495	450	-45	-9.1
	Imports	14,856	15,249	15,379	15,560	16,498	938	6.0
	Trade balance	-14,192	-14,611	-14,860	-15,065	-16,048	-983	-6.5

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.²This coding system is used by the U.S. International Trade Commission to identify major groupings and subgroupings of HTS import and export items for trade monitoring purposes³Less than \$500,000.

Note.—Calculations based on unrounded data.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table TX-5

Textiles, apparel, and footwear sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 2000–2004

USITC code	Industry/commodity group	2000	2001	2002	2003	2004	Percent change, 2004 from 2003
CH045	Fibers and yarns, except raw cotton and raw wool:						
	Number of establishments	(¹)	(¹)	681	(¹)	(¹)	(¹)
	Employees (thousands)	129.0	114.0	102.0	95.0	90.0	-5.3
	Capacity utilization (percent)	80	70	75	81	(¹)	(¹)
	U.S. shipments (million dollars)	21,720	19,477	18,241	16,600	(¹)	(¹)
	U.S. exports (million dollars)	3,126	2,640	2,656	2,872	3,192	11.1
	U.S. imports (million dollars)	2,771	2,545	2,641	2,676	3,160	18.1
	Apparent U.S. consumption (million dollars)	21,365	19,382	18,225	16,404	(¹)	(¹)
	Trade balance (million dollars)	355	95	16	196	32	-83.7
	Ratio of imports to consumption (percent)	13.0	13.1	14.5	16.3	(¹)	(¹)
	Ratio of exports to shipments (percent)	14.4	13.6	14.6	17.3	(¹)	(¹)
CH046	Fabrics:						
	Number of establishments	3,589	3,595	3,202	2,865	2,649	-7.5
	Employees (thousands)	297.0	262.0	228.0	199.0	184.0	-7.5
	Capacity utilization (percent)	76	71	67	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	37,478	32,385	30,600	28,050	25,940	-7.5
	U.S. exports (million dollars)	6,067	6,162	6,485	6,641	7,228	8.8
	U.S. imports (million dollars)	6,052	5,466	5,922	5,854	6,227	6.4
	Apparent U.S. consumption (million dollars)	37,463	31,689	30,037	27,264	24,939	-8.5
	Trade balance (million dollars)	15	696	563	786	1,001	27.4
	Ratio of imports to consumption (percent)	16.2	17.2	19.7	21.5	25.0	16.3
	Ratio of exports to shipments (percent)	16.2	19.0	21.2	23.7	27.9	17.7
CH047	Carpets and rugs:						
	Number of establishments	441	559	538	511	487	-4.7
	Employees (thousands)	57.0	55.0	55.0	50.0	50.0	0.0
	Capacity utilization (percent)	79	77	75	78	(¹)	(¹)
	U.S. shipments (million dollars)	11,983	12,176	12,080	12,092	(¹)	(¹)
	U.S. exports (million dollars)	791	711	684	681	763	12.0
	U.S. imports (million dollars)	1,464	1,410	1,531	1,662	1,829	10.1
	Apparent U.S. consumption (million dollars)	12,657	12,875	12,926	13,073	(¹)	(¹)
	Trade balance (million dollars)	-674	-699	-846	-981	-1,066	-8.7
	Ratio of imports to consumption (percent)	11.6	11.0	11.8	12.7	(¹)	(¹)
	Ratio of exports to shipments (percent)	6.6	5.8	5.7	5.6	(¹)	(¹)

See footnote(s) at end of table.

Table TX-5—Continued

Textiles, apparel, and footwear sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 2000–2004

USITC code	Industry/commodity group	2000	2001	2002	2003	2004	Percent change, 2004 from 2003
CH048	Home furnishings:						
	Number of establishments	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Employees (thousands)	73.0	66.0	60.0	57.0	55.0	-3.5
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	9,688	9,134	9,800	10,000	(¹)	(¹)
	U.S. exports (million dollars)	418	403	363	339	365	7.7
	U.S. imports (million dollars)	3,215	3,332	4,226	5,021	6,107	21.6
	Apparent U.S. consumption (million dollars)	12,485	12,063	13,663	14,682	(¹)	(¹)
	Trade balance (million dollars)	-2,797	-2,929	-3,863	-4,682	-5,742	-22.7
	Ratio of imports to consumption (percent)	25.7	27.6	30.9	34.2	(¹)	(¹)
	Ratio of exports to shipments (percent)	4.3	4.4	3.7	3.4	(¹)	(¹)
CH049	Apparel:						
	Number of establishments	16,505	15,478	14,182	13,391	12,640	-5.6
	Employees (thousands)	497.0	426.0	360.0	312.0	285.0	-8.7
	Capacity utilization (percent)	75	69	72	66	(¹)	(¹)
	U.S. shipments (million dollars)	60,339	54,598	53,621	52,970	56,282	6.3
	U.S. exports (million dollars)	8,177	6,537	5,491	4,965	4,414	-11.1
	U.S. imports (million dollars)	64,402	63,995	63,927	68,274	72,404	6.0
	Apparent U.S. consumption (million dollars)	116,564	112,056	112,057	116,278	124,271	6.9
	Trade balance (million dollars)	-56,225	-57,458	-58,436	-63,308	-67,989	-7.4
	Ratio of imports to consumption (percent)	55.3	57.1	57.0	58.7	58.3	-0.7
	Ratio of exports to shipments (percent)	13.6	12.0	10.2	9.4	7.8	-17.0

See footnote(s) at end of table.

Table TX-5—*Continued*

Textiles, apparel, and footwear sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 2000–2004

USITC code	Industry/commodity group	2000	2001	2002	2003	2004	Percent change, 2004 from 2003
CH051	Footwear:						
	Number of establishments	389	381	364	339	(¹)	(¹)
	Employees (thousands)	31.0	26.0	22.0	20.0	19.0	-5.0
	Capacity utilization (percent)	64	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	3,760	3,511	3,498	2,718	(¹)	(¹)
	U.S. exports (million dollars)	664	638	520	495	450	-9.1
	U.S. imports (million dollars)	14,856	15,249	15,379	15,560	16,498	6.0
	Apparent U.S. consumption (million dollars)	17,952	18,122	18,358	17,783	(¹)	(¹)
	Trade balance (million dollars)	-14,192	-14,611	-14,860	-15,065	-16,048	-6.5
	Ratio of imports to consumption (percent)	82.8	84.1	83.8	87.5	(¹)	(¹)
	Ratio of exports to shipments (percent)	17.6	18.2	14.9	18.2	(¹)	(¹)

¹ Not available.

Note.—Calculations based on unrounded data.

Source: These data have been estimated by the Commission's international trade analysts on the basis of primary and secondary data sources including discussions with various Government and industry contacts. These estimated data are subject to change either from secondary sources or from detailed surveys the Commission often conducts in the course of statutory investigations or other work. Further, these data may undergo adjustments based on revisions in tariff nomenclature, classification practices, or redefinitions of industry classes.